■ BY LEE DRAPER

Managing the Workload

Many grantmakers are doing more work with fewer staff members. Here are some tips for balancing an increased workload with a life outside the office.

job in philanthropy once had an enviable profile: being paid to contemplate important issues of the day, having access to the most up-to-date data and analysis about those issues, and playing an important role in supporting the nonprofit organizations that were best poised to offer solutions Although those responsibilities have not changed, today they are too often conducted at a breakneck pace, as the demands upon grantmakers have increased exponentially

The call for professionalization of the field has led philanthropy to regard itself in terms of business models, and the speed of business life is escalating "There's been a rise in levels of efficiency, goals of what will get done and how much productivity an individual can generate," observes Jennifer Hollahan, director for executive education at the Council on Foundations. "This trend in corporate America has increased expectations in philanthropy and among nonprofit leaders "

There are myriad reasons why grantmakers are having to do far more with far less: A weakened economy in 2002 led many foundations to reduce staff Those grantmakers have subsequently adopted a lean staffing structure as a fundamental value Cuts in government programs have increased the volume of requests submitted to private sector funders The amount of data and professional literature to review is staggering In some cases, recent increases in assets have led foundations to increase the number of grants awarded annually or to launch new initiatives without hiring additional staff In community foundations, many program officers are asked to manage donor relations at the same time as grantmaking

Further, Hollahan adds, "We've incorporated interacting and partnering with nonprofits and collaborating with other funders in our work processes This creates a more complex grantmaking process and requires a longer horizon It takes more time " Eric Jones, program officer at the Flintridge Foundation, agrees that this factor has increased his workload "There's an increased focus on being involved in the fields in which we fund, particularly in partnering with other funders to increase overall support for our areas of interest," he says

Managing the Workload

Interviewees

ELIZABETH "LIZ" BREMNER, former President, The Foundation Incubator

TODD M. HANSON, Vice President of Donor Relations and Community Partnerships, Orange County Community Foundation

CRYSTAL HAYLING, President & CEO, Blue Shield of California Foundation

JENNIFER HOLLAHAN, Director, Executive Education, Council on Foundations

WENDY GAREN HOPPE, Executive Director, The Ralph M. Parsons Foundation

ERIC JONES, Program Officer—Conservation, Flintridge Foundation

JEFF SCHAFFER, Senior Program Officer, Conrad N. Hilton Foundation

VIRGINIA MARTINEZ VICTORIN, Vice President, Corporate Giving, Southwest Region, Washington Mutual

Meeting Increased Demands

How do grantmakers meet the demands of a skyrocketing workload? What happens to the important steps of personalized phone calls to nonprofit applicants, site visits and keeping abreast of what's happening in the trenches? We talked to eight seasoned grantmakers to discover the strategies they use to thrive in their work despite new challenges.

Although each of the grantmakers reported that workloads have dramatically increased in recent years, most cite positive circumstances leading to that situation. Wendy Hoppe, executive director of The Ralph M. Parsons Foundation, finds that "the nonprofit community has become more sophisticated at seeking funds. We're not necessarily seeing more applications, but we're seeing stronger ones. We have to spend more time looking at competitive proposals. Also, everyone seeking funds wants to have contact with the program officer; there are a lot more phone calls."

Liz Bremner, former president of

The Foundation Incubator (now known as The Philanthropy Incubator), finds that grantmakers also are developing greater acumen. She observes, "There is increased demand for professional standards in philanthropy—in information management, accountability, the documentation of grants, evaluation and the use of business plans—these all add to the workload, but increase our effectiveness."

Crystal Hayling, president and CEO of Blue Shield of California Foundation, pinpoints another contemporary issue affecting managing work: "There's a lot of concern about foundations staying lean, keeping overhead costs down in order to channel more money to the community." She supports this value despite the consequences to her staff. "Our workload is huge, while the staff is small," she says. "We would have to double our staff to be on par with other health foundations of comparable grantmaking size. That means we have to accomplish greater productivity through

the systems we put in place."

Todd Hanson, vice president of donor relations and community partnerships for the Orange County Community Foundation, is similarly upbeat about the growth in foundation work during the past decade. "As a community foundation, our goal is to increase philanthropy, and we are raising more money," he says. "The number of donors and resources has doubled in the last few years. Our staff has grown, but not necessarily in proportion to the growth in grantmaking revenues. We want to do a lot more for the community while containing our costs."

Jeff Schaffer, senior program officer of the Conrad N. Hilton Foundation, finds himself busier for similar reasons. "We've also seen growth in our assets; this provides us with a larger grants budget," he remarks. "All of the program staff is handling more grants. We also use a major initiative approach involving multiyear grants, where the workload is heaviest in the beginning. Budget growth means more new initiatives are launched."

Flintridge's Jones also points to a deepened relationship with the nonprofit community. "I'm interacting with nonprofits about more than proposal- and grant-related issues," he says. "I am now more of a partner in some aspects, working closely with nonprofits and foundation colleagues on larger issues that affect the entire field."

Maintaining High Standards

Perhaps because the circumstances contributing to the increased workload can

be viewed as positive, morale remains high, even in the face of working longer hours. The eight grantmakers were uniformly committed to maintaining the highest standards in terms of proposal review and providing support to grantees. Hayling comments, "Real value to the field is more than the transaction of handing out money; it's in the thoughtful, intellectually rigorous overview we can share. This is the area I'm particularly protective of, [because it] determines excellence."

But how can someone continue to perform with excellence when the to-do list keeps growing? Hollahan observes, "Program officers are personally subsidizing their foundations by working at night and on weekends, and by pursuing additional training and professional development on their own time. This obscures the actual cost of doing business."

Hoppe is familiar with this trend. "I have to take work home and spend time on the weekends for reading, reflection and writing. That's the only way to find quiet time." Schaffer agrees, "I'm working longer hours, not infrequently staying at the office until 9 or 10 p.m. Even so, the stack of reading material is high, and I have to take it home." Virginia Victorin, vice president of corporate giving for the Southwest region at Washington Mutual, adds, "The level of work has meant less leisure time for me, definitely."

Often, it's the individual's personal commitment that drives this demanding schedule. Hayling notes, "I find it challenging to decide when I'm not working.

When you believe in social change, it makes it hard to clock out."

Although this dedication is admirable, Hollahan notes the downside: "The field has lost many good people, and part of the reason is that the pace of work leaves them little time to grow and develop professionally or to achieve a balance with home life and personal pursuits."

It's not only professional development and private time that suffer. Bremner notes, "I hear from nonprofit managers that it's harder to reach people in foundations and that foundations aren't responding to requests in a timely fashion."

Though our interviewees consciously carve out time to be accessible to nonprofits, Hayling admits that a priority shift has taken place within her foundation. "There's less time for exploratory conversations," she says. "We spend more of our relational time with grantees with whom we expect to have a long-term relationship. The relationships are no less meaningful, but there are fewer of them."

"We have cut back on site visits," says Hanson. "We used to conduct them for every grantee, but now, if we're already familiar with an organization, we're less likely to do so. We have to be more selective." This can threaten a funder's ability to keep up-to-date with nonprofits and aware of the steps in their growth and development.

Victorin tells us, "The area that has suffered most is our interactions outside the office. We have to make tough choices about what we have time to attend."

Biggest Time Wasters

■ **Unplanned interruptions.** Phone calls, e-mails and unscheduled visits from colleagues or constituents can derail the day. Minimize those interruptions by designating times when you are not available during the day.

■ **Inefficient meetings.** Whether scheduled or unscheduled, meetings without clear goals and agendas, those that are allowed to veer from the topic, or those that require the presence of staff who don't need to be there are enormous wastes of time and momentum.

■ **Clutter and disorganized data.** Have you ever spent the better part of an afternoon searching for a document or a phone number? It's worth the investment of time to keep things organized.

■ **Procrastination and indecision.** Those items that you set aside because you "just can't think about it now" can come back to haunt you.

■ **Lack of priorities.** Without a self-determined set of key objectives, you may find yourself continually putting out fires or at the mercy of others' needs.

Managing the Workload

> "If [a task] is not relevant and essential to carry out the foundation's mission, eliminate it "

Hoppe agrees, "We go to fewer events in the community—convenings, openings, fundraising or special events And we no longer go to ground breakings, only to ribbon cuttings " Thus, grantmaking professionals have less time to celebrate with nonprofits, get a feel for their community and clients, or support them at critical public gatherings.

Opportunities for interaction with peers have also been reduced Hoppe confides, "On my desk is an invitation to serve on a planning committee for a national grantmakers conference. I have to turn it down " Schaffer reveals, "I'm not as involved in philanthropic organizations as I used to be I held a leadership position with a grantmakers organization, and when my term expired, I didn't replace it with anything These days, I tend to go to conferences only if I am speaking at them."
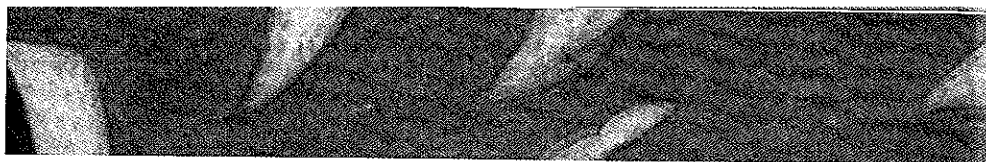
Seeking Technological Solutions

Many foundations are turning to technology to help streamline the workload Hoppe says, "I'm glad it's not 30 years ago The workload would be intolerable without the computer Our staff has Treos and it helps to be connected to our e-mail all of the time." Victorin recounts that at Washington Mutual, "We converted to online applications in April [2005]—a lifesaver, in my opinion Our online system helps with screening requests and it automatically declines those outside our guidelines "

The Blue Shield of California Foundation has developed a similar system "We are moving to an online grants application," Hayling says "It will answer frequently asked questions and enable an automated screening process For a while, we will continue to allow paper applications, but to be honest, that won't be possible forever Our structure requires that we use tools like this to capture all of the efficiencies possible in our grants evaluation, data management and information-sharing systems "

Information management is a critical area in which streamlining and effective use can make a difference Hayling adds, "Our grants management system will allow everyone in our office access to grant files, whether they are in the office or offsite " Hanson says, "We've upgraded our database, which allows us to track activities and donors and easily pull up the data we need All of our staff calendars are linked in Outlook, which makes scheduling easier " Jones reports, "The [Flintridge] foundation has upgraded all of its computers and uses shared files for administrative tasks We use Outlook calendars, which is helpful in scheduling and overall communication, especially with our staff housed in diverse locations and frequently out in the field."

Bremner agrees, "We see people using more online tools Intranets and LISTSERVs are being used to share information within a specific group Websites contain a lot more useful content for grant applicants, other funders and the public." Hollahan expands upon this point: "Foundations are getting into knowledge management—making available more data about lessons learned, contacts and research, both within a funder's staff and externally This is another aspect of collaboration."

However, Schaffer sounds this cautionary note: "Technology can be both a help and a hindrance; we try for e-mail rather than hard copy communications—proposals, reports, interoffice—but this in itself creates more work One has to pay attention to e-mail so it doesn't build up" Also, e-mail encourages people to expect a rapid response to all types of communication and to have access to all staff levels.

The increasing volume of work has stimulated improvement of systems and procedures Victorin comments, "Because of a clear recognition that we needed to become more efficient because of the workloads, we embarked on a two-year, management-led process of examining our systems and methods We eliminated system redundancy, delays and variances, and were able to cut processing and reviewing time by 40 percent"

Hayling's foundation has undergone a similar process "We're trying to be more thoughtful about the work flow," she says "We've graphed out the work to create greater efficiency and more effective delegation We're also working on our evaluation process, trying to figure out how to make our reporting mesh with the actual level of detail we need to know: are organizations actually being strengthened? Is the safety net getting stronger or weaker? Those details can be entered into an electronic system and pulled out into a report."

To maximize productivity, professional staff should be able to delegate work to support staff. Adequate administrative and program support assistance

How to Manage E-Mail

(Adapted from www.learnthenet com)

■ **Establish separate business and personal accounts.** Keep your personal and professional lives separate, especially since employers in many countries can legally review messages on company mail servers Do you really want your boss reading about your personal life? Having a separate personal account also means you aren't dealing with personal business on company time

■ **Develop a routine.** Answer your e-mail at set times during the day—perhaps the first thing in the morning, then mid-afternoon This prevents incoming mail from interrupting other things you may be doing

■ **Set up your e-mail software for rapid review.** With e-mail programs such as Microsoft Outlook, you can customize the multipane display for quick viewing Ideally you want to see who the sender is, the subject and be able to read the first few lines of the message That way you don't have to open every message to discern its content

■ **Scan new messages and delete spam immediately.** Junk e-mail has become a fact of electronic life, so turn it to your advantage Quickly review message subjects and read a line or two of the message, if necessary, to identify spam Then use the delete key Weeding out spam reduces your inbox by half or more, providing a psychological boost when you only have 50 messages to deal with, instead of 100

■ **Use filtering.** To further reduce the volume of mail, use filtering tools built into your e-mail program They let you block messages sent from certain addresses, an excellent way to reduce spam You can also automatically route messages from certain addresses into folders you set up For instance, if you belong to a discussion group, messages will go directly into that folder, instead of your inbox

■ **Organize your messages into folders.** Create a series of folders to categorize your e-mail, using action items (pending, review, etc) and subjects (travel, newsletters, etc) After you receive messages, file them away for later action and reference Messages remaining in your Inbox are those requiring immediate action Reply, then file them, too

■ **Use short responses.** Everyone is pressed for time these days, so keep replies brief and to the point E-mail has developed its own shorthand that doesn't require the formal response of a letter

■ **Prepare boilerplate responses.** You may find that you are often asked the same questions To save time and avoid retyping the answers, just cut and paste a prepared reply You can then edit it as required

■ **Control the rhythm of the exchange.** Yes, e-mail is instant communication, but that doesn't mean a reply has to occur instantly Take time to consider your response This will slow down a stream of messages flying back and forth

For more tips about managing e-mail, download www goodexperience com/reports/e-mail/email-report-goodexperience pdf

Managing the Workload

Ten Tips for Staying on Top of the Workload

1. Assess your personal rhythms. Are you sharpest in the morning or the afternoon? Schedule the tasks that require your greatest brainpower at the times when your energy is at its peak.

2. Invest time in planning. Establish your goals for the year, the quarter, the month, the week and each day. This allows you to be proactive and not simply reactive with your time. Take ten minutes at the end of each day to plan for the next.

3. Include only as much on your to-do list as you can actually accomplish in a day. Carrying things over from one day to the next contributes to the feeling of always being behind.

4. Be realistic about the amount of time a task actually takes. Underestimating can result in over-scheduling the day and feeling frustrated about what's left undone.

5. Examine your work process. Identify and eliminate unnecessary steps, redundancies and wasted effort. Encourage your office to examine this collectively as well.

6. Ask for help. Delegate or enlist colleagues in brainstorming other approaches to accomplish a given task.

7. For projects that require concentration and reflection, give yourself quiet time by not taking phone calls or appointments. If possible, it may be productive to work outside the office.

8. Each day schedule something that is fun or inspires you. Giving yourself moments of enjoyment keeps the work from becoming drudgery.

9. Designate specific times in the day to respond to e-mail and phone calls. That way, the day won't feel like it's full of interruptions.

10. Congratulate yourself for what you have accomplished, instead of fretting over what you have not yet completed.

can allow program officers to work at their peak and optimally draw on their experience

Finding Balance

Despite the reduced time for interaction with peers and colleagues, many of those interviewed said that interaction helps relieve work pressure Hoppe says, "Over the past two years, a group of Southern California grantmakers has been meeting for collegial, peer-to-peer conversations, and this helps reduce stress levels "

Hayling reports, "Our group has signed up for a WalkingWorks program—the goal is to walk at lunch in pairs and as a team. We also have lunch together every two weeks out of the office, where we don't talk about work." Schaffer believes that "it's important to joke with co-workers, to go to lunch occasionally, and not talk about the office " Hollahan jokes, "We eat at almost all of our meetings This fosters networking and a more open, conversational setting "

Self-care is another critical coping strategy Hayling says, "I try to leave the office at a reasonable hour; this sets a tone for the rest of the team And I try to allow for flexibility in staff schedules to accommodate their lives "

For many, family and friends provide a powerful counterbalance Schaffer says, "Family time is an important part of making sure the work doesn't become all-consuming If I've had to work late nights, I make sure I'm not also working the weekends " Hanson notes that his foundation schedules its board meetings

> "There is increased demand for professional standards in philanthropy—in information management, accountability, the documentation of grants, evaluation and the use of business plans—these all add to the workload, but increase our effectiveness."

in the morning, rather than on the weekends. "We try to structure the work to enable staff to have a balanced life."

Victorin also spends free time volunteering for several nonprofits and comments, "This keeps me grounded."

"A key part of time management is how you take care of yourself," Bremner agrees "You have to realize that the work will never be done, because our work is about changing the world It's important to preserve your personal time; don't read work-related publications after 8 p.m. I like to have a novel going, something that will take me into another world." On a similar note, Hayling adds, "I have to check my god complex I'm not the only one doing this work—a movement is never just one person. You can put down your tool, and someone else will pick it up."

Remembering Priorities

When asked what advice they have for their colleagues who are struggling with their workload, responses run the gamut Hollahan says, "This sounds basic, but I would frequently revisit the foundation's funding guidelines and values statements This reminder can fuel, propel and guide the work and help you to manage priorities."

Hoppe also believes that establishing priorities is key. "Among all the things there are to do, determine categories A, B and C. Then focus on the As."

Victorin suggests the importance of having "a daily to-do list And don't use the word 'and' when talking to others about your work, such as: 'I have to do this and that and this' This makes your

work dauntingly heavier and can keep you from moving forward on all deliverables." Hayling agrees: "Create to-do lists that are doable. If it seems impossible, ask yourself, 'Why am I trying to do all these things?'"

Jones contributes a helpful system. "The foundation has quiet hours in the morning," which helps staff to attend to the work that requires thoughtful reflection and a sustained attention span Bremner also clusters activities that require different levels of energy "Designate periods in the day to respond to e-mail, rather than responding immediately and all day long," she says "Set aside no-meetings days—these will give you the chance to process a lot of work. Group out-of-office meetings."

Hanson advises, "Be surrounded by good people; the right people for

the job Conduct internal audits periodically—look at time allocations and reduce unnecessary activities And always relate activity back to the mission. If [a task] is not relevant and essential to carry out the foundation's mission, eliminate it."

Schaffer reminds us that it's what we bring to the work that determines how much we get back "Ultimately, we must each find work that relates to our passion Then it's not hard to give 110 percent" FN&C

Lee Draper, Ph.D., is president of Draper Consulting Group Since 1990, the firm has provided services to more than 120 grantmakers and nonprofits in planning, governance, board and staff development, and effective grantmaking (www.drapergroup.com)

Interviewees' Recommended Resources

■ Bossidy, Larry, Ram Charan and Charles Burck. *Execution: The Discipline of Getting Things Done.* New York: Random House, 2002.

■ Collins, Jim. *Good to Great: Why Some Companies Make the Leap and Others Don't.* New York, New York: HarperCollins, 2001.

■ Covey, Stephen R. *The Seven Habits of Highly Effective People: Powerful Lessons in Personal Change.* New York: Simon and Schuster, 1989.

■ Draper, Lee. "Get out of Your Rut," *Foundation News & Commentary,* January/February 2002, p. 33–38. Online at www.foundationnews.org/CME/article.cfm?ID=1723.

■ Loehr, Jim and Tony Schwartz. *The Power of Full Engagement: Managing Energy, Not Time, is the Key to High Performance and Personal Renewal.* New York: The Free Press, a division of Simon and Schuster, 2003.

■ Whyte, David. *The Heart Aroused: Poetry and the Preservation of the Soul in Corporate America.* New York: Currency Doubleday, 1994.